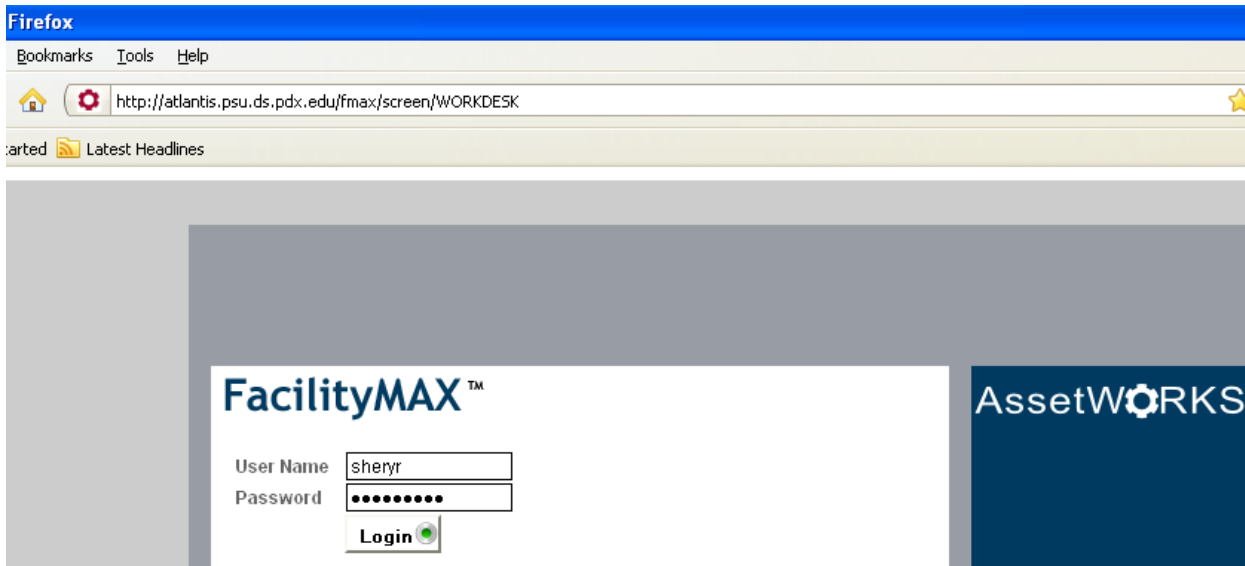


Portland State University
Entering a Customer Request in Facility Max

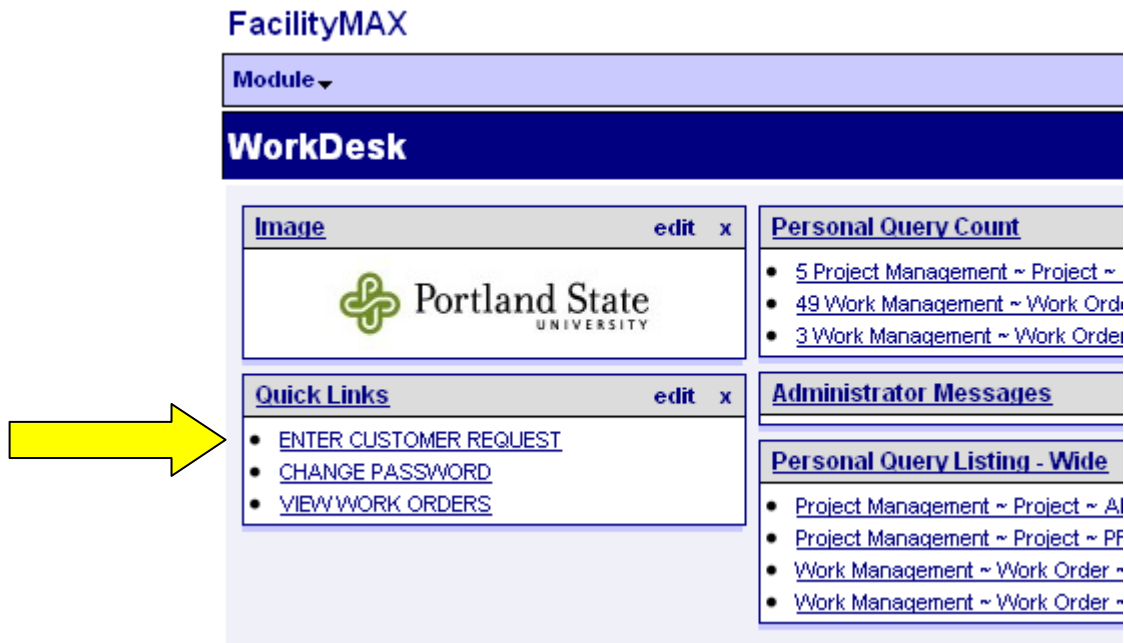
If your request is for an urgent matter like a life safety issue; or where property damage will occur if the issue is not fixed immediately, please call the work order center at 5-8362. After hours please call Public Safety Office at 5-4404.

Access the log in screen and log into Facility Max:

(URL <http://atlantis.psu.ds.pdx.edu/fmax/screen/WORKDESK>)



This will bring up your individual WorkDesk, double click to select ENTER CUSTOMER REQUEST from your Quick Links.

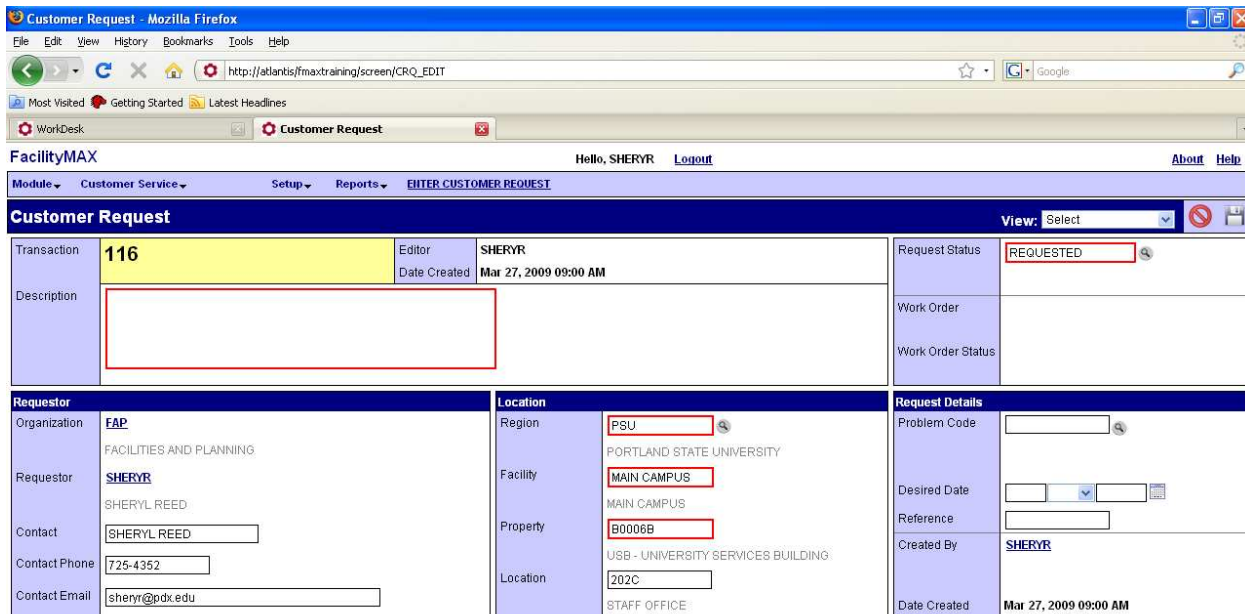


Portland State University Entering a Customer Request in Facility Max

This will open a blank Customer Request form, to be able to enter a new request you need to click on the blank white page icon on the far right side of the form.



This will cause the form to have certain fields outlined in red which lets you know you are in edit mode. All of the fields in red are required.



Description:

Based upon your login the system will pre-populate some of the fields for you. The first step is to enter a description of the work that needs to be done. Be sure to provide enough information so that it is clear to Facilities what the problem is, or what service you would like us to perform.

If the request is for something like cleaning up a spill, please include information like what has spilled, water, coffee, blood, unknown chemical so that we can send the appropriate staff to respond to your request.

If the work needs to be done during a specific time period, please include that in the description. If you do not know the room number, please give us enough information so we can find the location, i.e. 3rd floor women's restroom, hallway outside of computer lab, etc.


Portland State University Entering a Customer Request in Facility Max

If the request is something that is a departmental expense, please include Bill to: INDEX, or if the billing is a little more complicated with multiple billing sources you can say see attached document for billing. *In the unlikely event that you run out of room in the description, see the instructions for the extra description at the end of this document.*

Transaction	101	Editor	SHERYR
		Date Created	Apr 07, 2009 10:14 AM
Description	PLEASE CLEAN UP WATER SPILL IN HALLWAY OUTSIDE OF THE FOOD COURT		

Requestor:



Based upon your login, Facility Max pre-populates your contact information, make sure the contact information is correct, change it if necessary; the email address in the Contact Email field is where the system will send all of the emails about this customer request and the work order created from it.

Requestor	
Organization	FAP 
	FACILITIES AND PLANNING
Requestor	SHERYR
	SHERYL REED
Contact	SHERYL REED
Contact Phone	725-4352
Contact Email	sheryr@pdx.edu

If your organization and requestor information is blank, this means that you have access to more than one organization, click on the zoom icon to the right of organization and search for the organization that you wish to submit the request for.

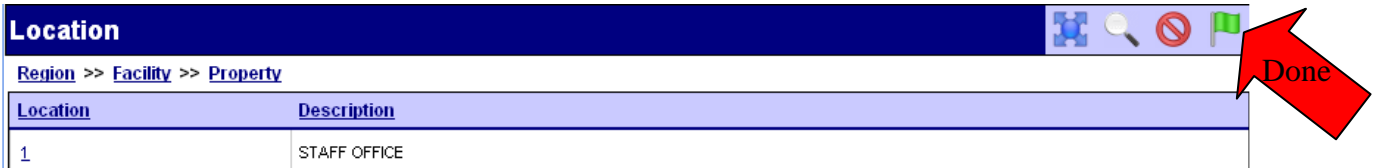
Location (room):

The location may pre-populates based upon your login, if the location field (room number) is not correct but the property (building) is; you can delete the location and either type in the room number, then click on the zoom icon to the right of the Region PSU field to make sure the room number exists in the database.

Location	
Region	PSU 
	PORTLAND STATE UNIVERSITY
Facility	MAIN CAMPUS
	MAIN CAMPUS
Property	B0006B
	USB - UNIVERSITY SERVICES BUILDING
Location	202C 
	STAFF OFFICE

Portland State University Entering a Customer Request in Facility Max

Zooming may bring up a list of either all of the rooms that match your criteria, ie room 174 might bring up a list of 174, 174A, 174B, select the room that you want from the list. It may also bring up a list of all of the rooms in the building. If that happens, your room number is not in the database, go ahead and leave the location field blank by clicking the green done flag, and describe the location in the description.

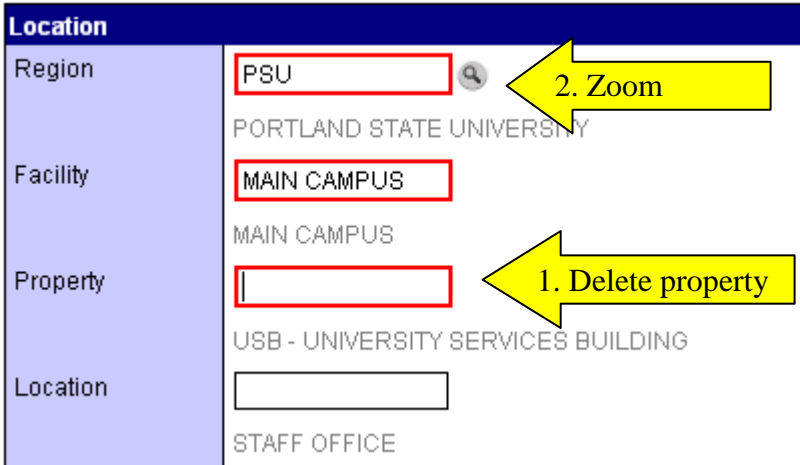


The screenshot shows a web application interface with a dark blue header labeled "Location". Below the header, there are navigation links: "Region >> Facility >> Property". A table with two columns, "Location" and "Description", is displayed. The first row contains the number "1" in the "Location" column and "STAFF OFFICE" in the "Description" column. To the right of the table, there are several icons: a blue square with a white plus sign, a magnifying glass, a red circle with a white slash, and a green flag. A large red arrow points from the text "Done" to the green flag icon.

Property (building):

If the property (building) that pre-populates is not correct, you can search for the correct building. All of the buildings are in the database by their Banner IDs, this is so that if a building name changes, we can keep all of the buildings history.

To find the building you are looking for, delete the information in both the Property and Location fields, and then click the zoom icon to the right of the Region PSU field.



The screenshot shows a web application interface with a dark blue header labeled "Location". Below the header, there are four sections: "Region", "Facility", "Property", and "Location". Each section has a text input field and a dropdown menu. The "Region" field contains "PSU" and has a magnifying glass icon to its right. A yellow arrow points from the text "2. Zoom" to the magnifying glass icon. The "Facility" field contains "MAIN CAMPUS". The "Property" field is empty. A yellow arrow points from the text "1. Delete property" to the empty "Property" field. The "Location" field is empty. Below each input field, there is a dropdown menu with the following text: "PORTLAND STATE UNIVERSITY" under Region, "MAIN CAMPUS" under Facility, "USB - UNIVERSITY SERVICES BUILDING" under Property, and "STAFF OFFICE" under Location.

Buildings are identified by their Banner Location code, so to do a search we will want to search in the description field for either the building acronym, or the building name.

Once you have zoomed to the building list, you can either navigate through the different pages and click on the building you need, or you can click on the search icon to search for the building that you want.

Portland State University Entering a Customer Request in Facility Max

Property
Region >> Facility

Property	Description
B0001	LH - LINCOLN HALL
B0002	NH - NEUBERGER HALL
B0003	SB1 - SCIENCE BUILDING 1
B0004	PSC - PETER W. STOTT CENTER
B0005	SB2 - SCIENCE BUILDING 2
B0006A	PS2 - PARKING STRUCTURE 2
B0006B	USB - UNIVERSITY SERVICES BUILDING
B0008	ED - SCHOOL OF EDUCATION
B0009	BA - SCHOOL OF BUSINESS ADMINISTRATION
B0011	OND - ONDINE RESIDENCE & SEAS ANNEX

Navigation icons

Page 1 of 7 | < > | Records Found = 68

In the description field, use the pull down menu next to the description box and choose either contains or starts with. If you use contains then type a four or five letters in the building name. If you use starts with then in the description field type in the building acronym, i.e. NH.

Property Profile

Property Profile

Property =

Description contains

Property Class =

Property Status =

City =

County =

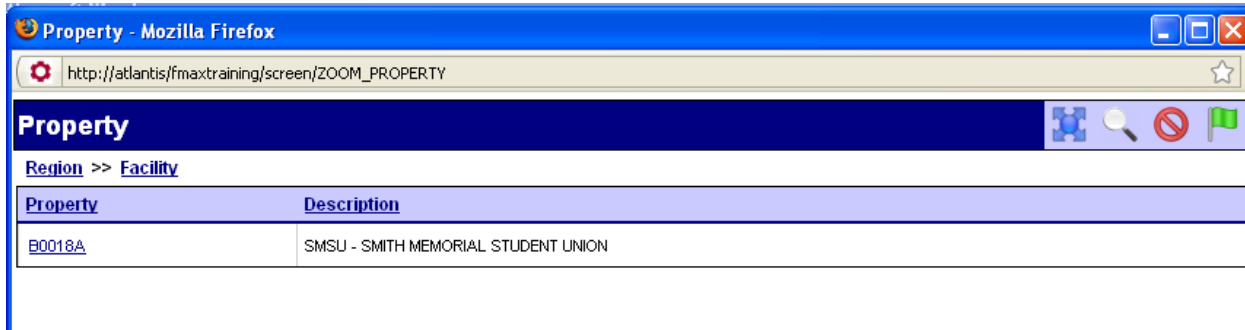
State =

Zip Code =

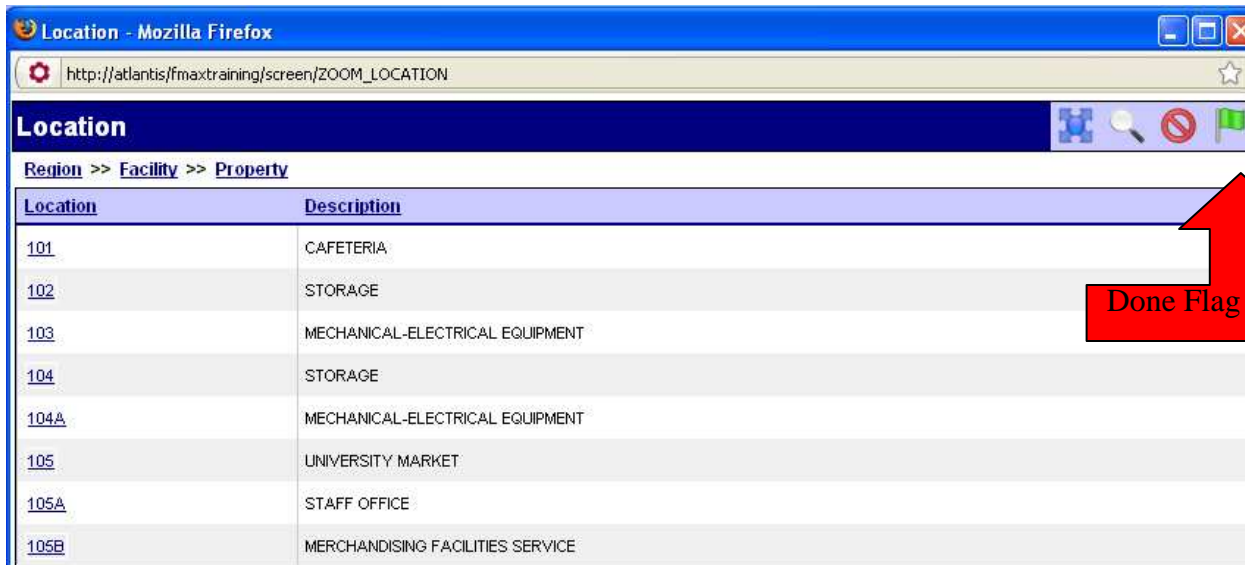
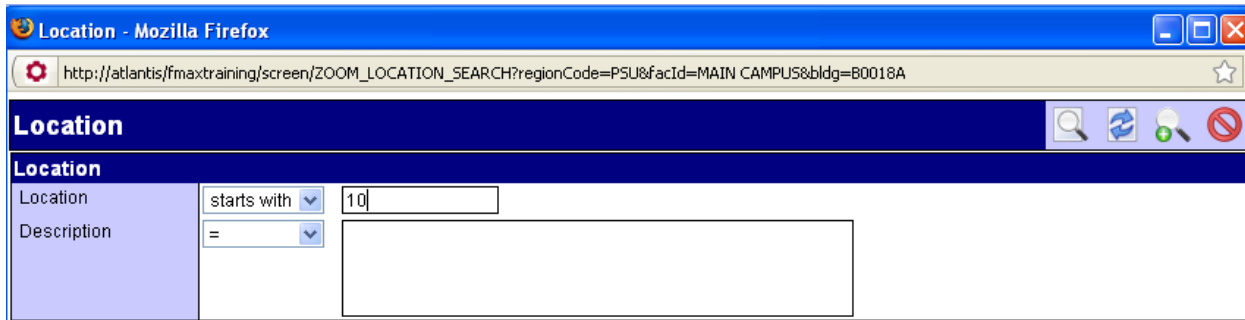
Country =

Portland State University Entering a Customer Request in Facility Max

When you have the description filled in click on the search icon which will bring up a list of the buildings that match your search criteria.



Click on the underlined Property that you want to select. This will bring up a list of the rooms in the building. You can use the same process to search for a room number, using the location field instead of the description.



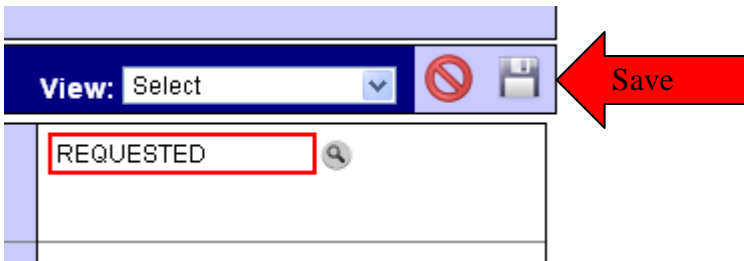
If you know the room number you do not need to search, you can click on the green done flag and enter the room number in the location field. If you do this be sure to click on the zoom icon next to the region field that says PSU.

Portland State University
Entering a Customer Request in Facility Max

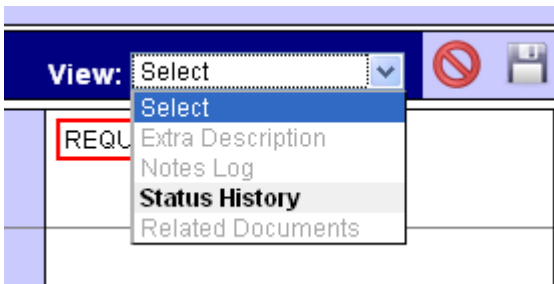
Customer Request Status	
Status	Description
REQUESTED	REQUESTED BY CUSTOMER
NEEDS CUST APPROVE	THIS WORK NEEDS TO BE APPROVED BY THE CUSTOMER
CANCEL	CANCELED BY CUSTOMER

*If you select **NEEDS CUST APPROVE** the work order center will not process your request until someone in your organization has set the Request Status to **CUST APPROVED**.*

At this point you may click on the save icon in the upper right corner of the form to complete your customer request. If you would like to enter more information than could fit in the description field or if you would like to attach a document to the request follow the instructions below.



If you need to add more information than would fit in the description field, you can use the extra description option. To access the extra description, use the pull down menu in the View field, next to the word select. A list of options will appear, if the items in the list are “grayed out” that means that there is no data there. Select the extra description option.



Transaction	134	Editor	SHERYR
Extra Description		Date Created	Apr 14, 2009 10:05 AM

You can enter additional information in the extra description field. When you are finished click the green done flag to exit this screen.

Portland State University Entering a Customer Request in Facility Max

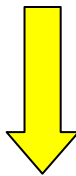
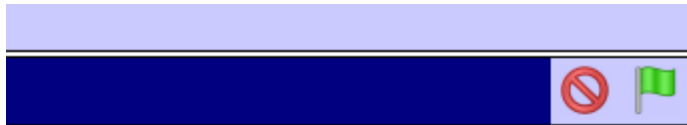
If you have a file that you would like to attach to the Customer Request such as a spreadsheet that might contain billing information, a Word file that might contain information about the scope of work that needs to be done, a pdf file that might be a sketch of the new layout for the office, or a picture which shows the leak you are talking about; you can use the related documents option.

In the View: Select drop down menu select related documents, the related documents screen will appear.

Related Documents				
Transaction	134	Editor	SHERYR	
		Date Created	Apr 14, 2009 10:05 AM	
Description	PLEASE CLEAN UP WATER SPILL IN HALLWAY OUTSIDE THE FOOD COURT			

Document Listing					
<input type="checkbox"/>	Launch	Document	Title	Name	Edit Date

To add a document click on the icon that has a yellow page with a green plus in it. The paper clip icon is used to update a file that is already attached.



This will open up a browse screen, click on the browse button and select the file that you would like to attach. Once you have selected the file that you want, please enter something in the Title field that describes what you are attaching, like “floor plan”, “billing information”, “scope of work”.

Use the zoom icon next to the red field called Flag, and select GENERAL from the list. Once you have selected GENERAL, the file will move from the browse box into the view box. You can then click on the save icon.

Portland State University Entering a Customer Request in Facility Max

Document Administrator				View: Sel
Id	1496	Editor	SYSTEM	
		Edit Date	Apr 14, 2009 11:37 AM	
Description			Title	SPACE INFORMATION
			Lock Status	Available
			File Type	
			File Size	
			Flag	GENERAL
			GENERAL FILES	
View	E:\FMaxDocs\Training\mp\upload_00000006.csv			
Load file				<input type="button" value="Browse..."/>

This will bring you to a screen that shows the Document Listing, on this screen click on the green done flag, which will take you back to the main Customer Request screen, where you must click on the save icon to save your request, and submit it to the Work Order Center.

If you need to edit the request before the Work Order Center processes the request, such as to change description or the status field to CUST APPROVED, open the Customer Request and click on the icon with the white page that has a pencil across it, which will turn the required fields to red so that you know that you are in edit mode. Make your changes and then be sure to click on the save icon, to save your changes.

[About](#) [Help](#)

View: Select	
Request Status	REQUESTED
Work Order	

To save a copy of your completed request, click on the printer icon, which will open the Customer Request Summary report. Click on the Export icon which is the fourth icon from the left.

BIRT Report Viewer

Showing page ↑ of 1

Customer Request
134
 Status: REQUESTED

Customer Request Summary Report

Customer Request			
Description:	PLEASE CLEAN UP WATER SPILL IN HALLWAY OUTSIDE THE FOOD COURT	Created By:	SHERYR
		Date Created:	Apr 14, 2009 10:05

Choose PDF from the pull down list in the Export Format field, and then click OK.

